

Fig 1.

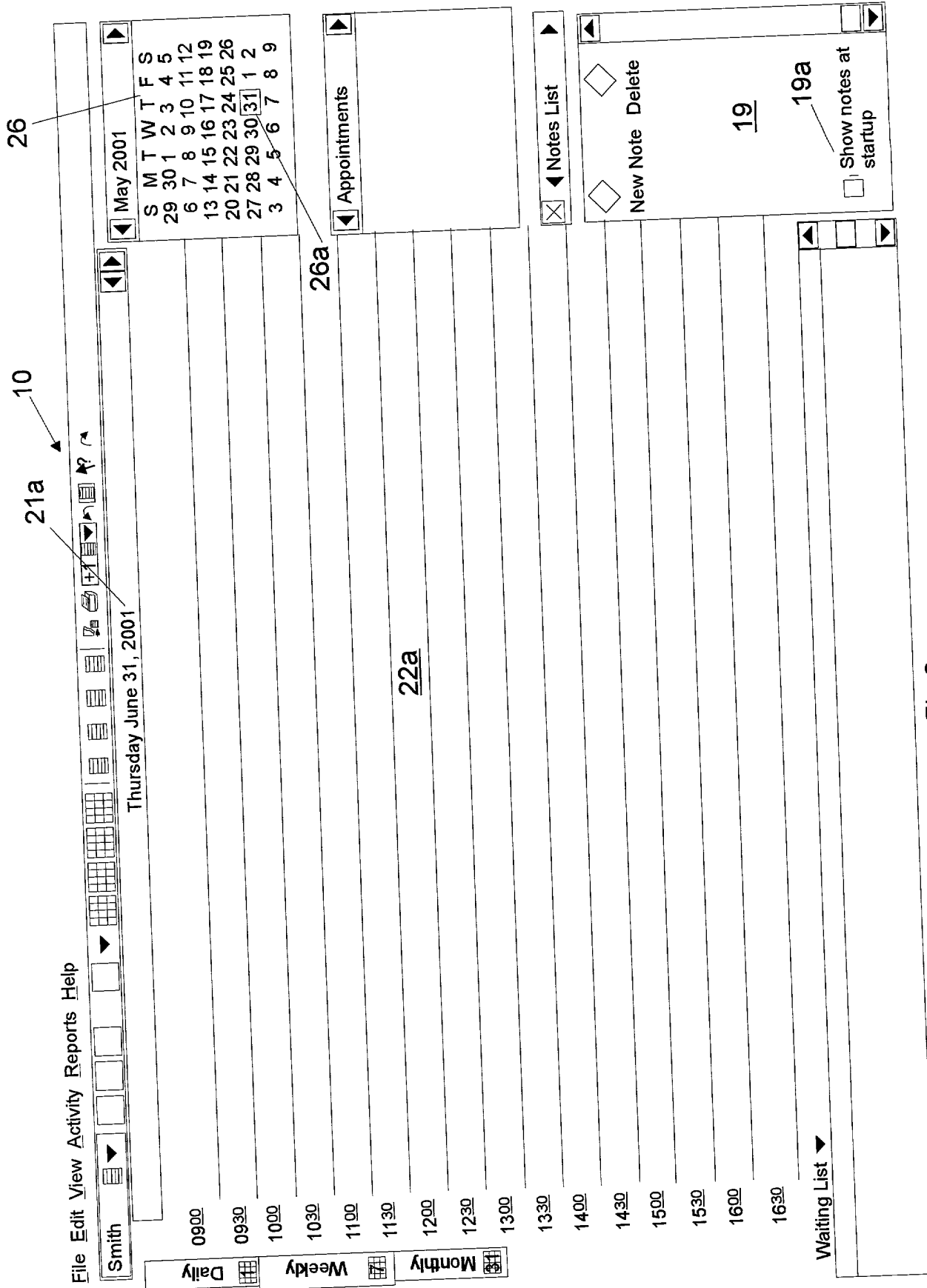


Fig 2.

10

21b

File Edit View Activity Reports Help

Smith

May, 2001

1st 2nd 3rd 4th 5th 6th 7th 8th 9th 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31

0900 0930 1000 1030 1100 1130 1200 1230 1300 1330 1400 1430 1500 1530 1600 1630

Daily Weekly Monthly

Appointments

Notes List

New Note Delete

Show notes at startup

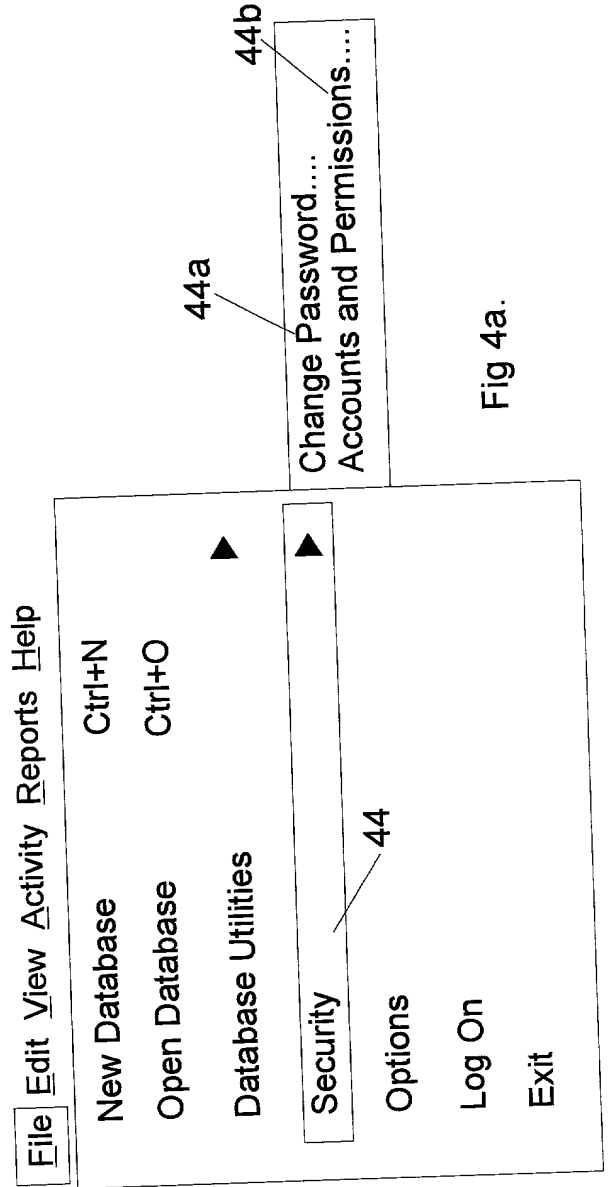
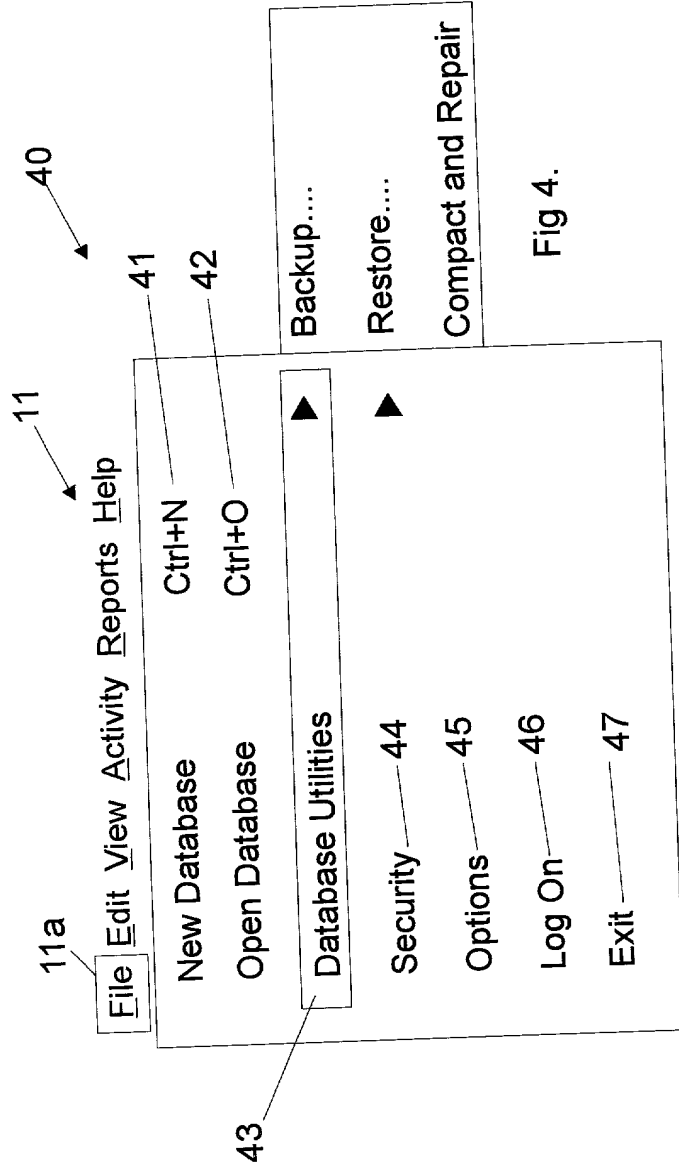
Waiting List

30

31

22b

Fig 3.



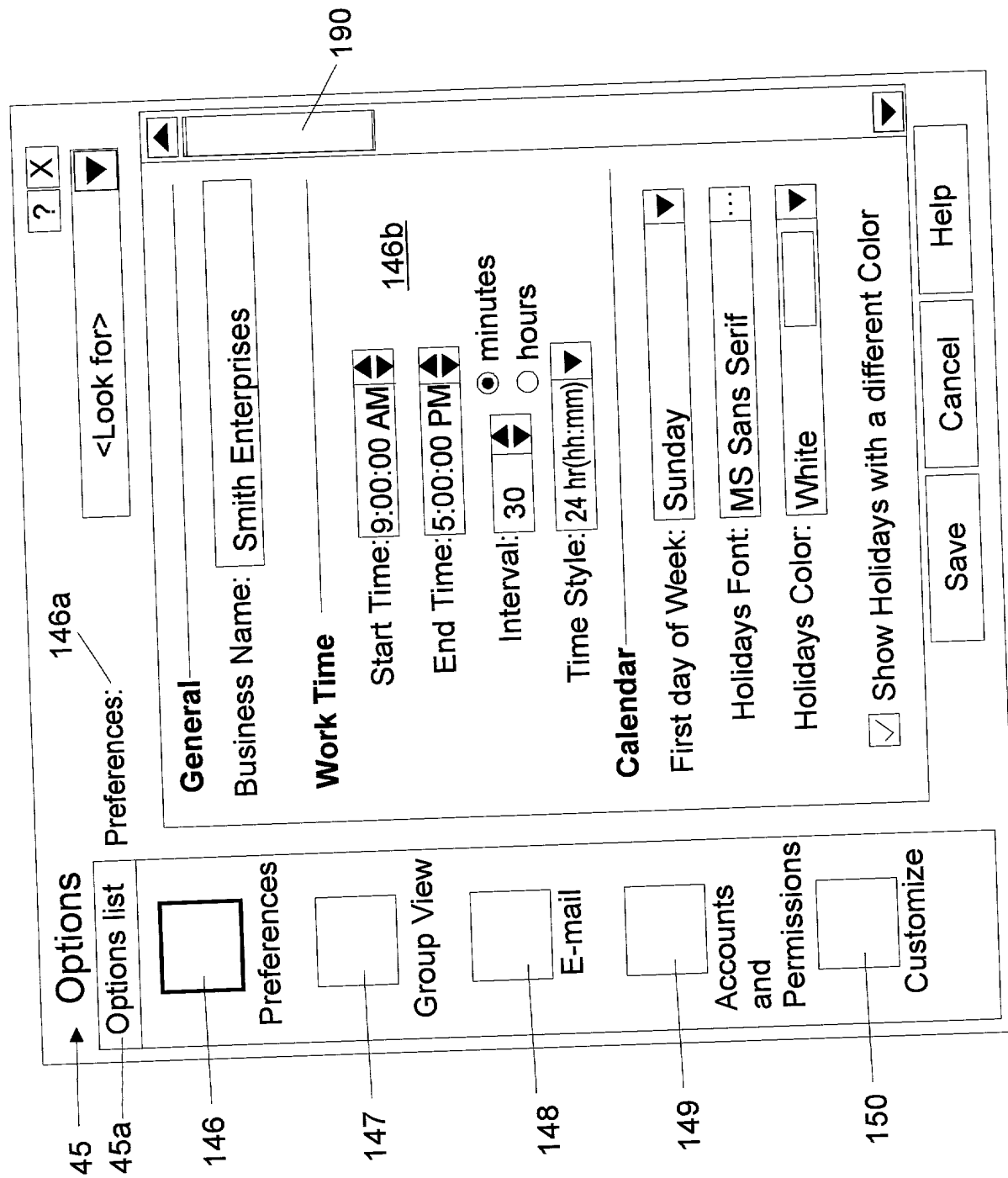


Fig 5.

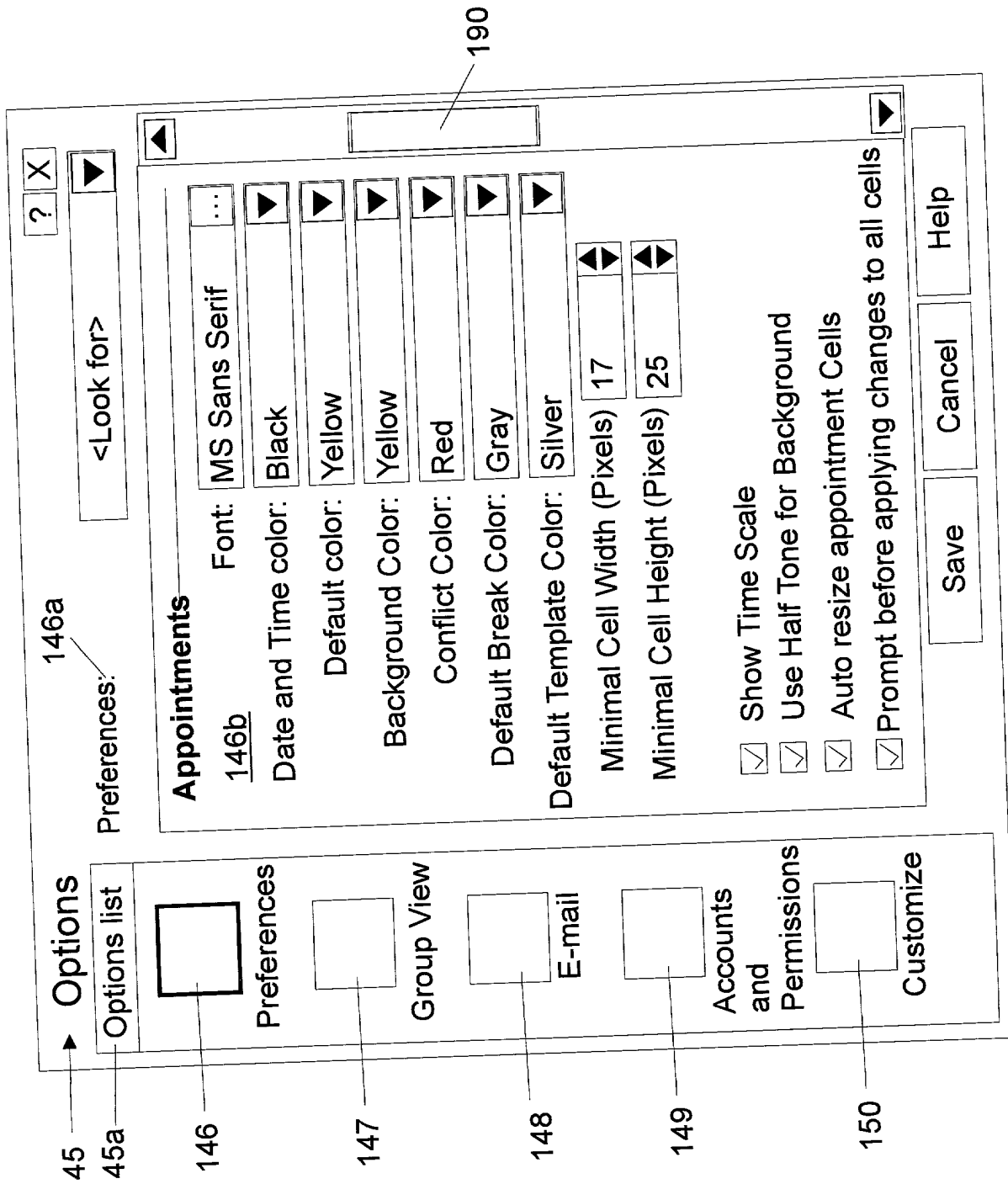


Fig 6.

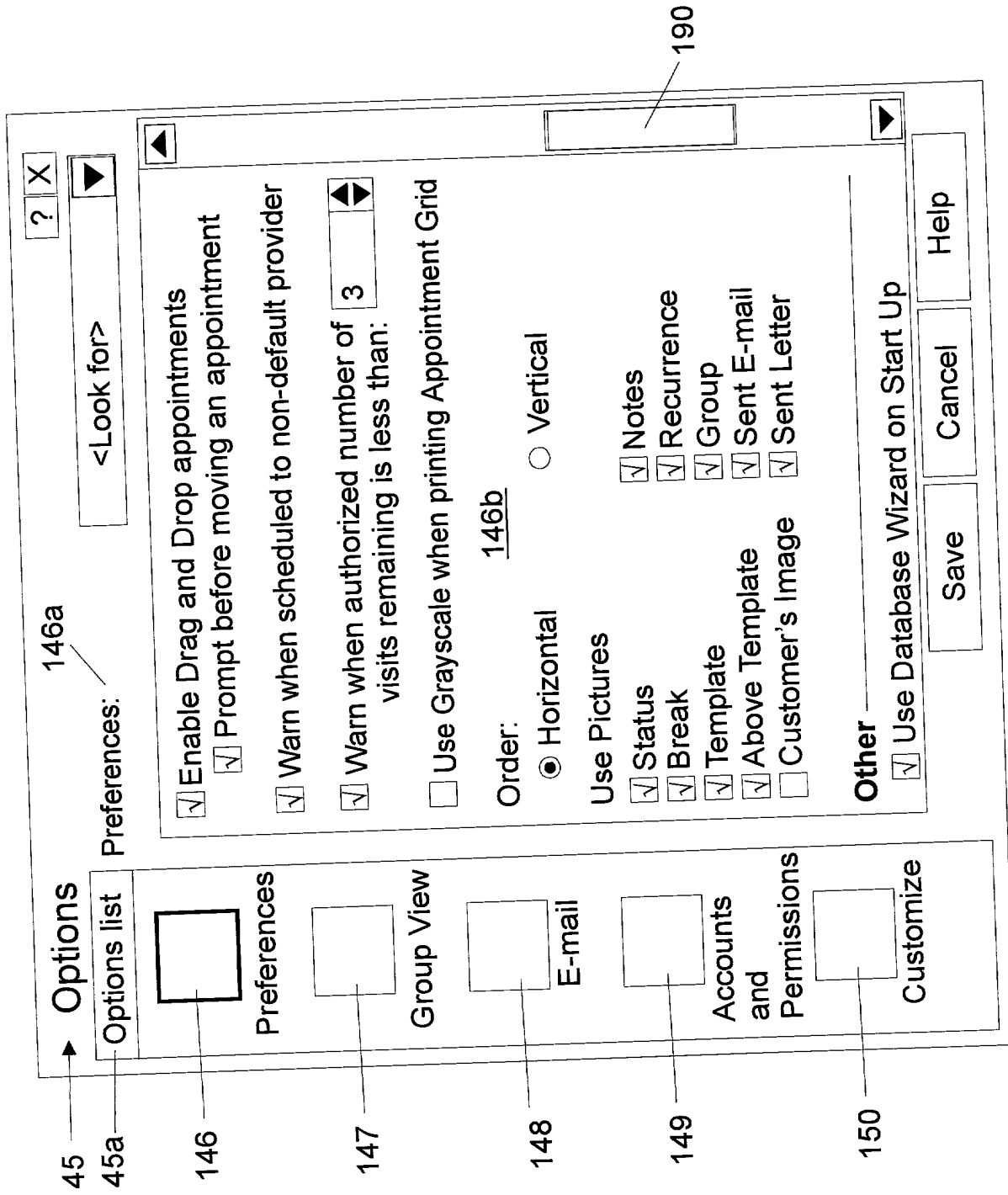


Fig 7.

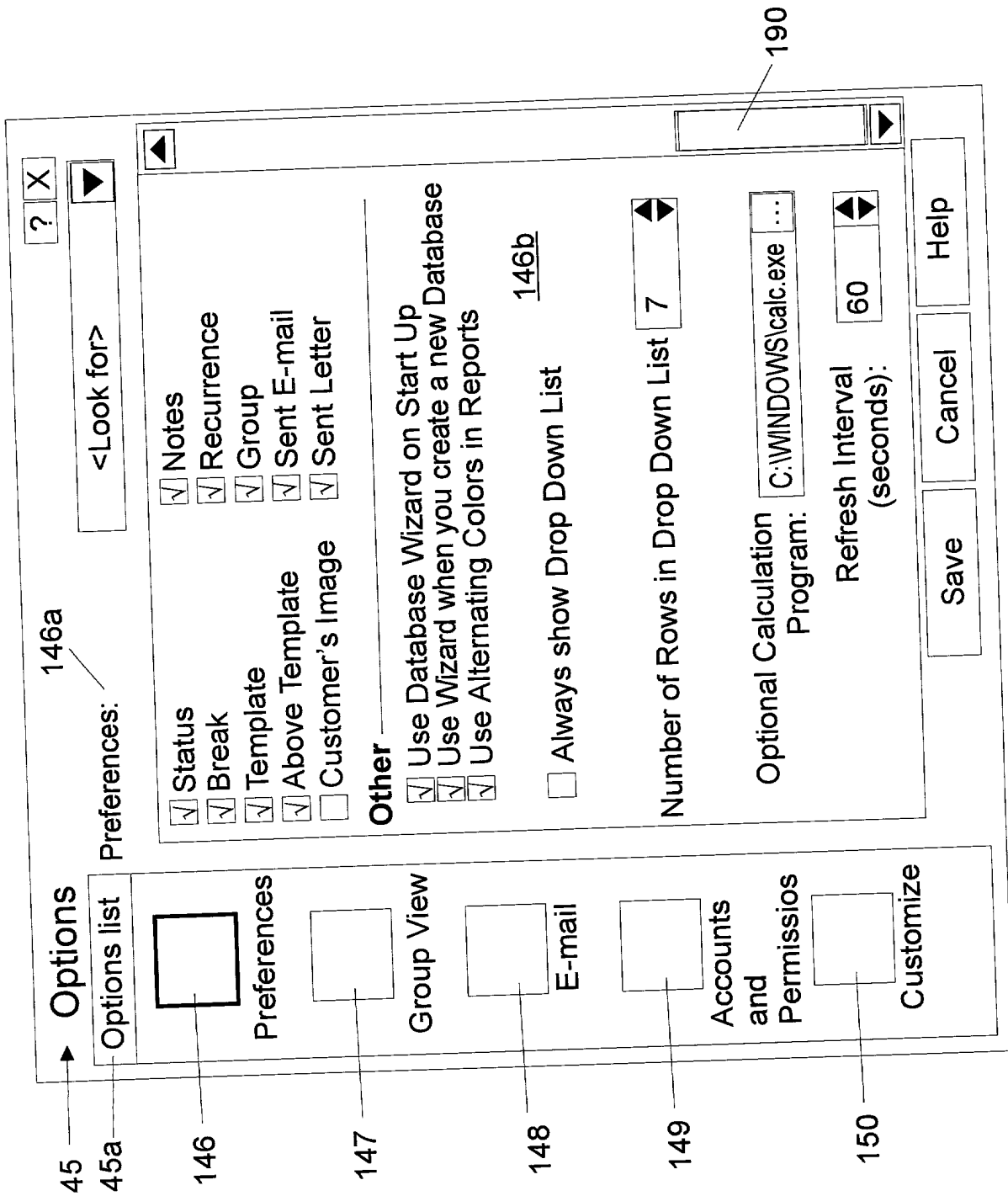


Fig 8.

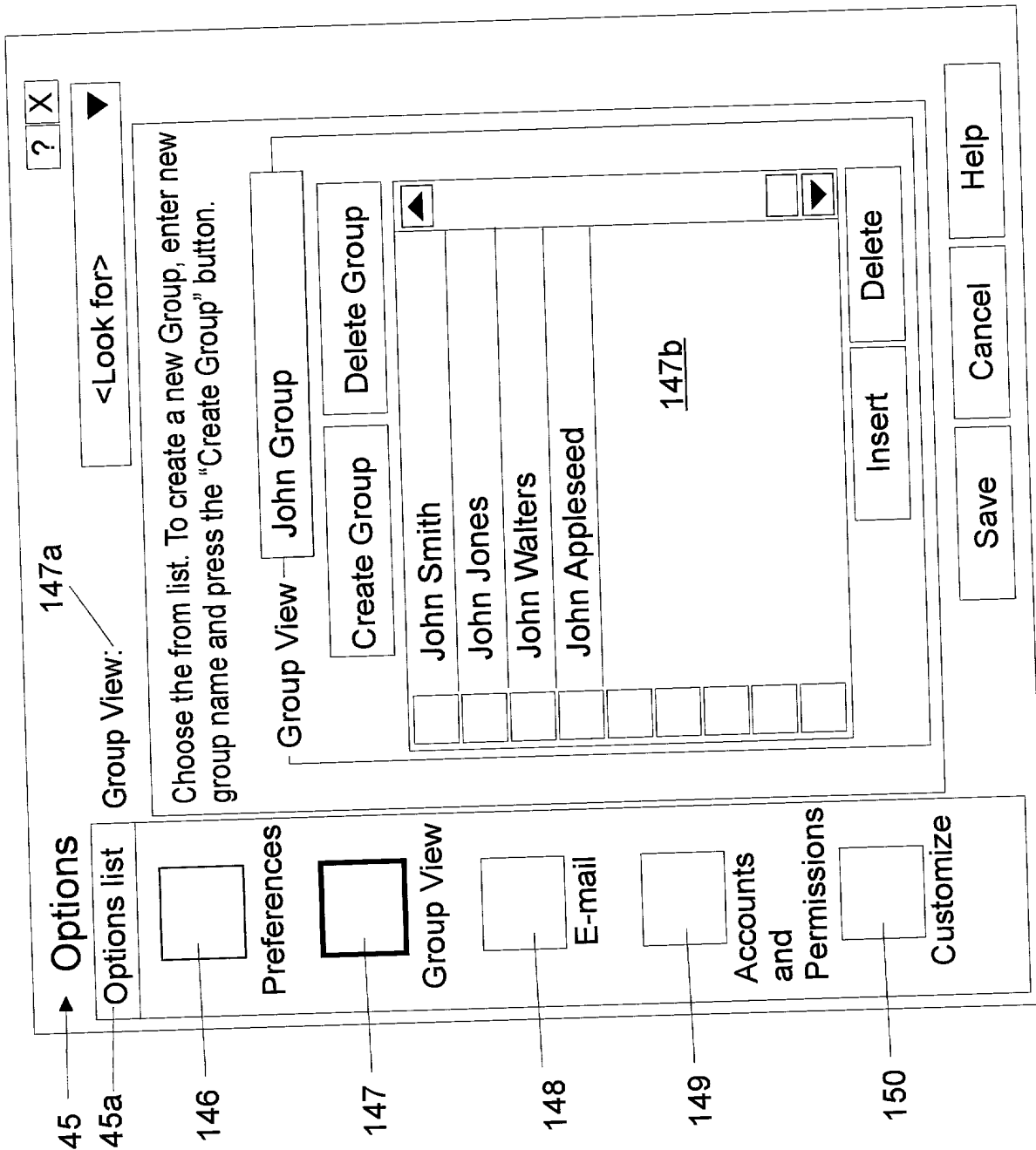


Fig 9.

45 → Options

45a → Options list

146 → Preferences

147 → Group View

148 → E-mail

149 → Accounts and Permissions

150 → Customize

148a → Mail Settings

<Look for>

E-mail options

Name: []

E-mail Address: []

Reply Address: []

Carbon copy to: []

Server

SMTP server: []

Port: []

Account Name: []

Password: []

Reminder Message 148b

Subject Line: []

Appointment Reminder

Reminder Message 148c

☒ Hide E-Mail window after connection

Save Cancel Help

Fig 10.

149a

Options

Options list

146

Preferences

147

Group View

148

E-mail

149

Accounts and Permissions

150

Customize

Accounts and Permissions

<Look for>

?

X

☒

Users must enter a name and password to use this database

Click to select the check box next to any action that you want to access

Administrators

Guest

Users

Power Users

Administrators have complete and unrestricted access to the computer/databases

Security

Options

File

Data

Reports

149b

Add

Remove

Properties

Save

Cancel

Help

Fig 11.

150a

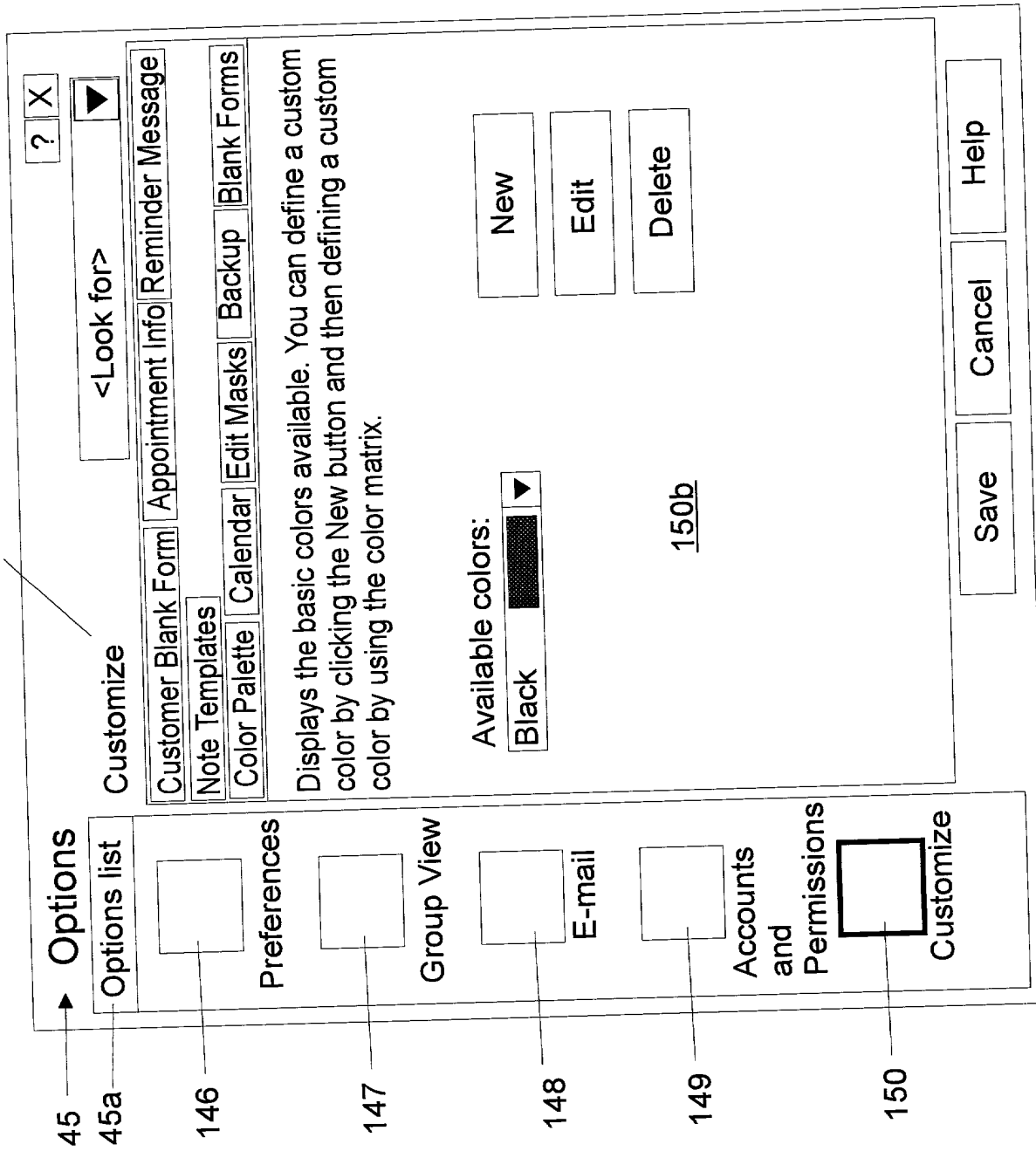


Fig 12.

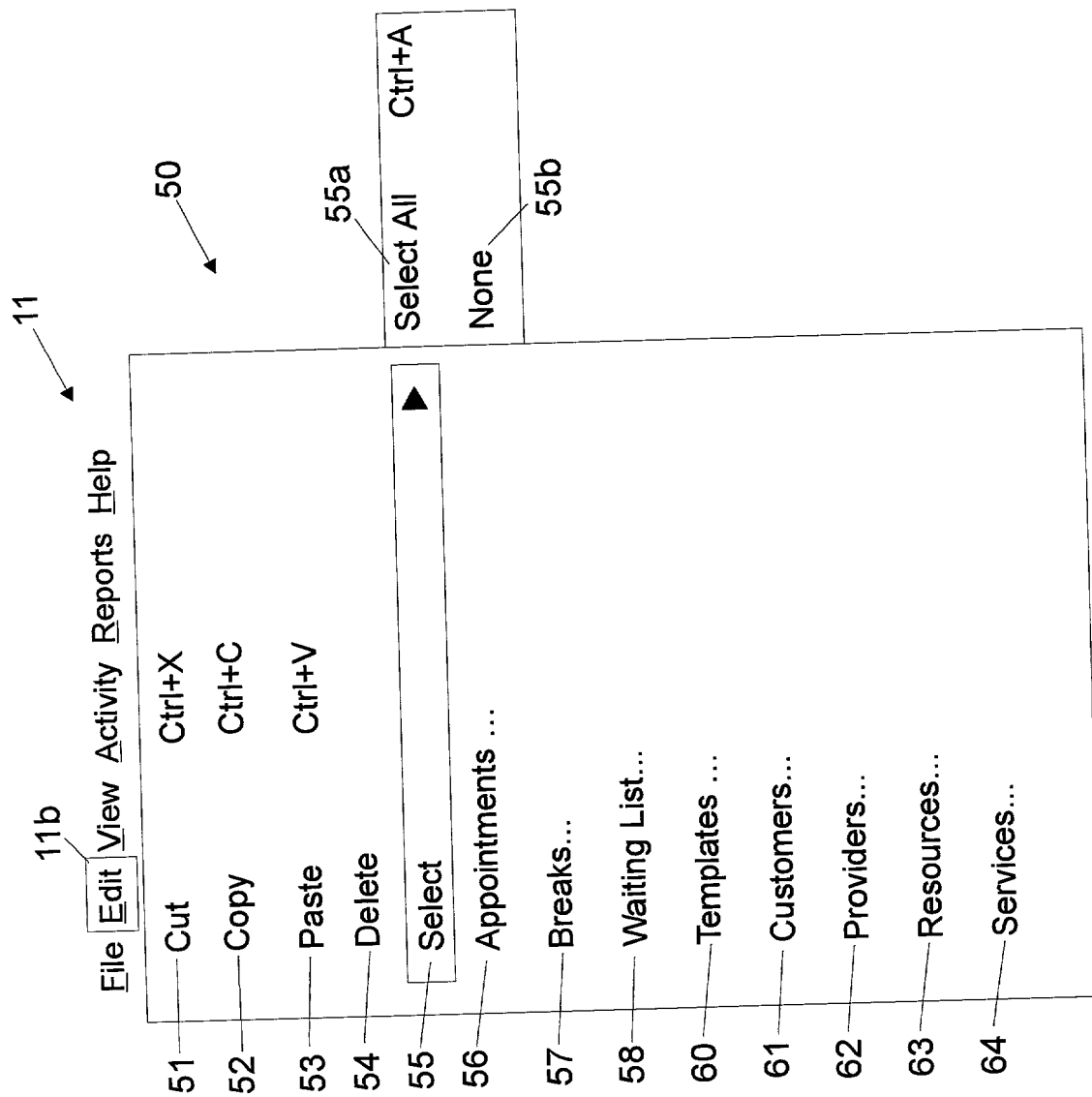


Fig 13.

113

114a 11

Today's Appointments

File Edit View Help

Categories X New Edit Delete Print Hide Help Close Save Cancel

Look for Smith

114

Appointments

115

Breaks

116

Waiting List

117

Templates

118

Customers

119

Providers

120

Resources

121

Services

New Appointment

Customer

Name

Phone

Providers/Resources

Add Image

History

Visits

Direction

Add Chart

Customize

Occurs

Date Tuesday June 05, 2001

Time 11:00 a.m.

Recurrence

▼ Change

Properties

Status Appointment Set

Service Code

Color Yellow

Duration min. hrs.

Charges

114b

Fig 14.

113

115a

11

Today's Breaks

File Edit View Help

Categories X New Edit Delete Print Hide Help Close Save Cancel

New Break

- 114 Look for Smith
- 115 Appointments
- 116 Breaks
- Waiting List
- 117 Templates
- 118 Customers
- 119 Providers
- 120 Resources
- 121 Services

Description

Providers/Resources

Properties

Color Gray

Duration min. hrs.

Occurs

Date Tuesday June 05, 2001

Time 11:00 a.m.

Recurrence

No repeat

Change

115b

Fig 15.

116a

Waiting List

File Edit View Help

Categories X New Edit Delete Print Hide Help Close Save Cancel

113

Joe Smith

Customer

Name Joe Smith

Phone

Providers/Resources

Properties

Priority Normal/Low

Service Code

Color Gray

Duration min. hrs.

114

115

116

117

118

119

120

121

Look for Smith

Priority Code Customer Name

Normal/ Joe Smith

Appointments

Breaks

Waiting List

Templates

Customers

Providers

Resources

Services

Note:

116b

Fig 16.

117a 11

Today's Templates

File Edit View Help

Categories X New Edit Delete Print Hide Help Close Save Cancel

Look for

114

Appointments

115

Breaks

116

Waiting List

117

Templates

118

Customers

119

Providers

120

Resources

121

Services

New Template

Description:

Providers/Resources

Properties

Service Code

Color Silver

Duration 30 min. hrs.

Password: without password

group password

user password

Set Password

Occurs

Date Tuesday June 05, 2001

Time 9:00:00 a.m.

Recurrence

No repeat

Change

Show message:

117b

Fig 17.

Customers

File Edit View Help

Categories X New Edit Delete Print Hide Help Close Save Cancel

Look for:

Code Full Name Company
Smith: Smith Joe

Appointments

Breaks

Waiting List

Templates

Customers

Providers

Resources

Services

Smith, Joe

Last Name: Smith

First Name: Joe

Company Name: Smith's Fritters

Middle initials:

Sex: Male

E-mail: smith@jones.com

URL:

Service Code:

Customer Type:

Provider:

Referral Source:

ID number 2:

Social Security #:

Birthdate:

Add Image

Appointments

Add Chart

Set Password

Customize

Phones: (941)555-1212 (941)555-1213

Directions:

Approval Code:

Definable Fields:

Visits Remaining: 999 Visits: 3

Note: Joe Smith's notes

118a

11

114

115

116

117

118

119

120

121

118b

119a

11

Providers

File Edit View Help

Categories X New Edit Delete Print Hide Help Close Save Cancel

113

Williams, Mike

Last Name Williams

First Name Mike

Middle initials

Credentials:

Address 1:

Address 2:

City:

State:

Zip code:

Phones: (941)555-1212 (941)555-1213

Fax: (941)555-1313

E-mail:

URL:

Type: Smith's Fritters

Set Password

114

Code Full Name

Smittj: Smith Joe

Willm: Williams Mike

115

Appointments

116

Breaks

117

Waiting List

118

Templates

119

Customers

120

Providers

121

Resources

Services

119b

Fig 19.

114 115 116 117 118 119 120 121

Resources
File Edit View Help
Categories X New Edit Delete Print Hide Help Close Save Cancel

120a

Truck 1

Code	Description
Truck 101	Truck1
X-Ray Unit	

Look for

Description Truck
Type Pickup

120b

Fig 20.

114 115 116 117 118 119 120 121

Appointments
Breaks
Waiting List
Templates
Customers
Providers
Resources
Services

Resource types Referral sources types Customers types Providers types Service codes

121a 11 113

Service Codes
File Edit View Help
Categories X New Edit Delete Print Hide Help Close Save Cancel

Look for

Code	Duration	Description
121c		

New Service Code

Description

Type

Color Yellow

Duration 30 min. ☐ hrs.

121b

Fig 21.

119a 11 113

Providers Types
File Edit View Help
Categories X New Edit Delete Print Hide Help Close Save Cancel

114
Appointments
115
Breaks
116
Waiting List
117
Templates
118
Customers
119
Providers
120
Resources
121
Services

Look for

Code Duration Description

119b

119c

Description

New Provider Type

Fig 22.

118a 11 113

Customer Types

File Edit View Help

Categories X New Edit Delete Print Hide Help Close Save Cancel

Look for

114 Appointments

115 Breaks

116 Waiting List

117 Templates

118 Customers

119 Providers

120 Resources

121 Services

Resource types Referral sources types Customers types Providers types Service types Service codes

Code Duration Description

118b

118c

Description

New Customer Type

Fig 23.

114

Appointments

115

Breaks

116

Waiting List

117

Templates

118

Customers

119

Providers

120

Resources

121

Services

Referral source types

File Edit View Help

New Edit Delete Print Hide Help Close Save Cancel

Categories X

Look for

Code Duration Description

130a

11

113

New Referral Source

Description

130b

Resource types Referral sources types

130c

Fig 24.

FIG. 25

113

120a

11

Resource Types

File Edit View Help

Categories X New Edit Delete Print Hide Help Close Save Cancel

Look for

Code Duration Description

114

115

116

117

118

119

120

121

Appointments

Breaks

Waiting List

Templates

Customers

Providers

Resources

Services

Resource types Referral sources types

120b

120c

New Resource Type

Description

Fig 25.

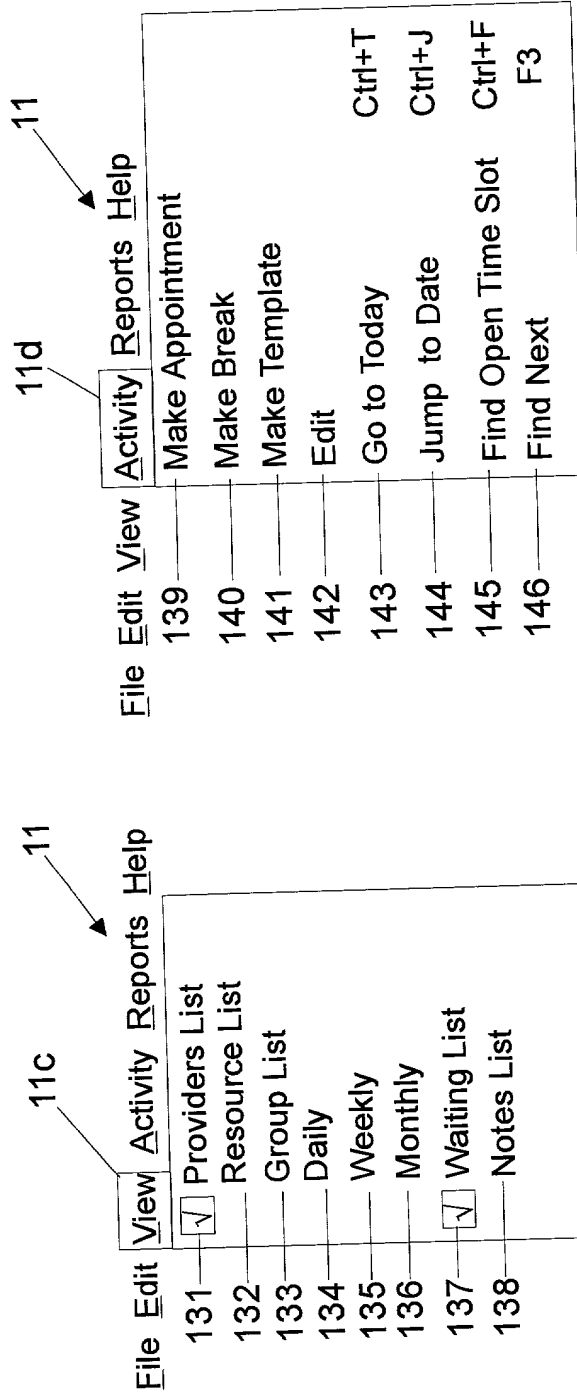


Fig 26a.

Fig 26.

	File	Edit	View	Activity	Reports	Help
146					Today's Appointments	
147					Appointment Grid	
148					Appointment List	
149					Mailing Labels	
150					Providers List	
151					Customers List	
152					Service Code List	
153					Appointment Status Report	
154					No Show List	
155					Top 25 List	
156					Appointment Reminder Messages	
157					Sent Reminder Messages	
158					Productivity Report	
159					Referral Source Report	
160					Zip Code Referral Report	
161					Authorized Visit Alert Report	
162					Revenue Generation Report	
163					Service Code Recall Report	
164					Report List	

11
11e

Fig 27.

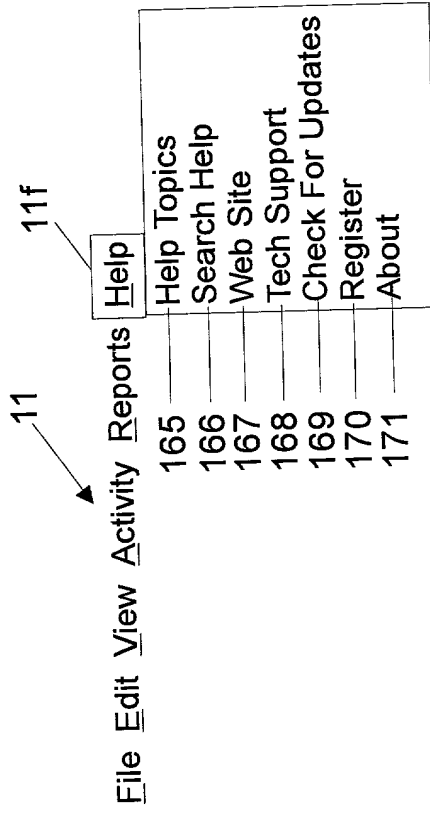


Fig 28.